



Indiana Recycling Infrastructure & Economic Study

Overview

September 2021



Background

- Commissioned by the Recycling Market Development Board (RMDB)
- Conducted by GT Environmental
- Evaluated Indiana's recycling infrastructure and the significant economic impact of recycling in the state
- Included are recommendations to improve statewide recycling and further develop a circular economy



Current Waste and Recycling Infrastructure

Data obtained through:

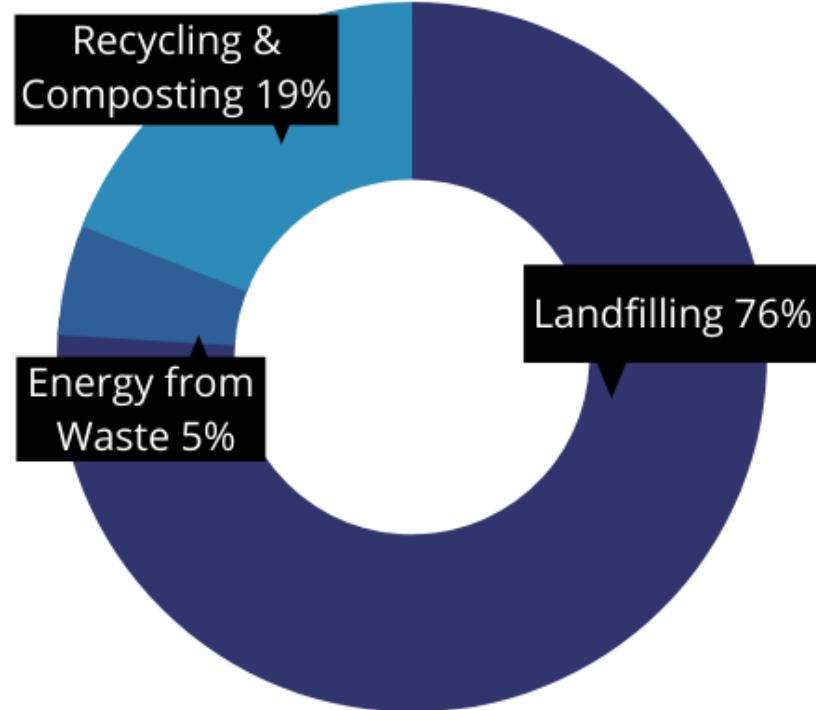
- IDEM recycling activity report
- Surveys to solid waste districts, communities, and processors
 - Conducted by IUPUI students



Current Waste and Recycling Infrastructure

- Approximately 8.8 million tons of MSW collected in 2019

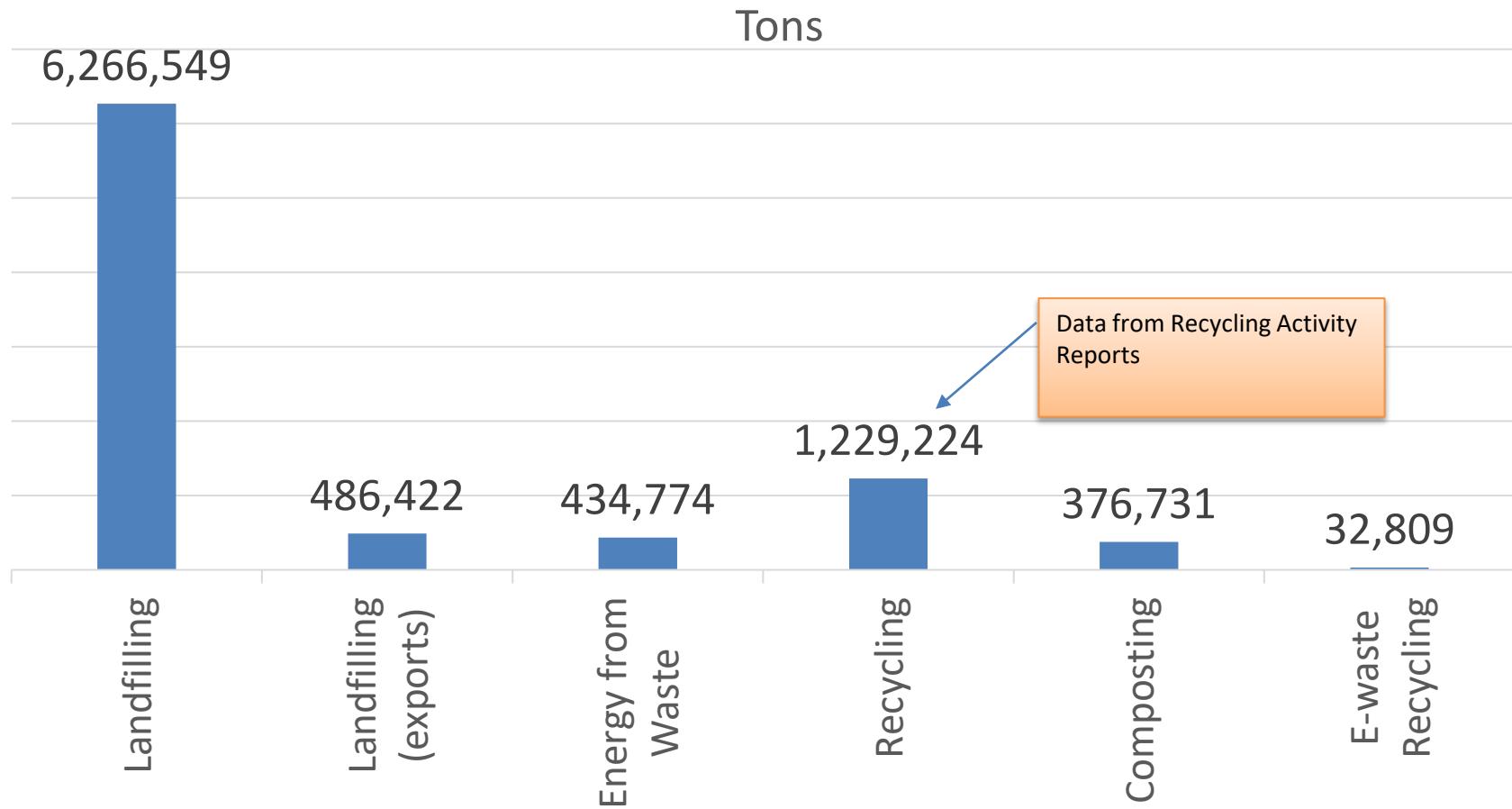
2019 MSW Final Destinations





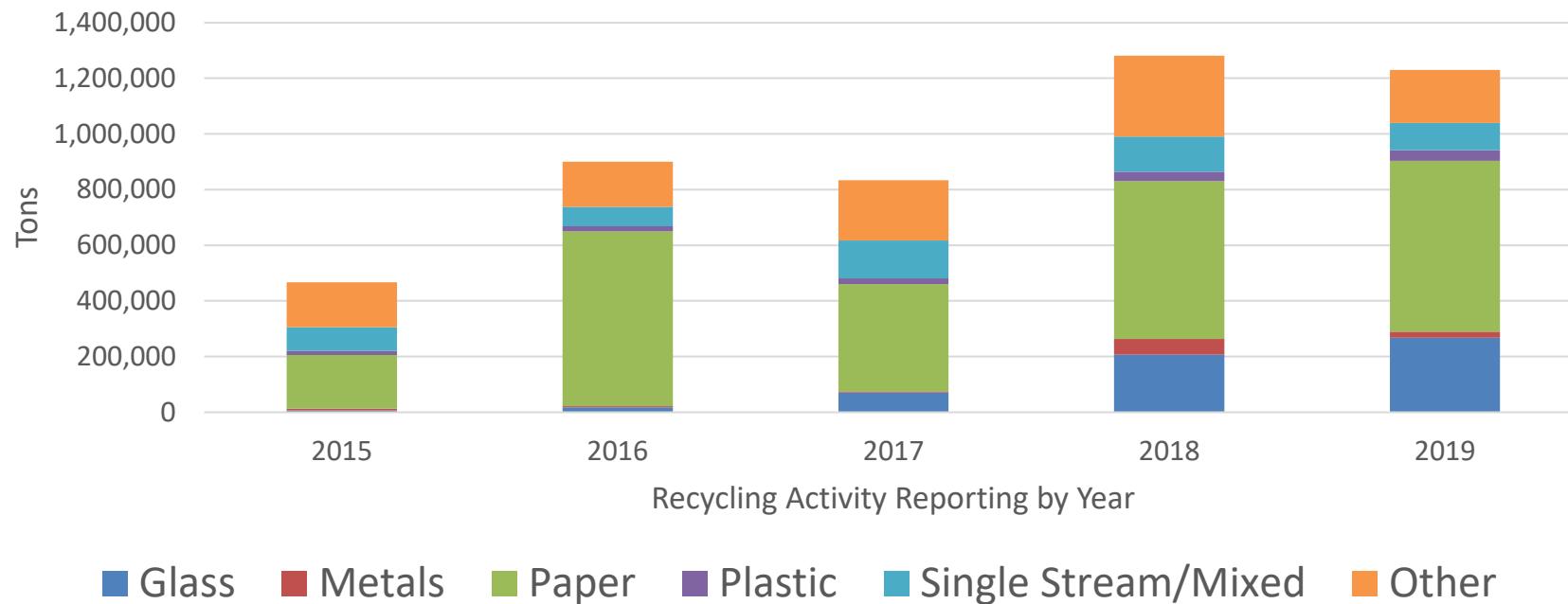
Current Waste and Recycling Infrastructure

2019 municipal solid waste (MSW) generation





Annual Shipments of Recyclables





Office of Program Support

Current Waste and Recycling Infrastructure

34 Landfills



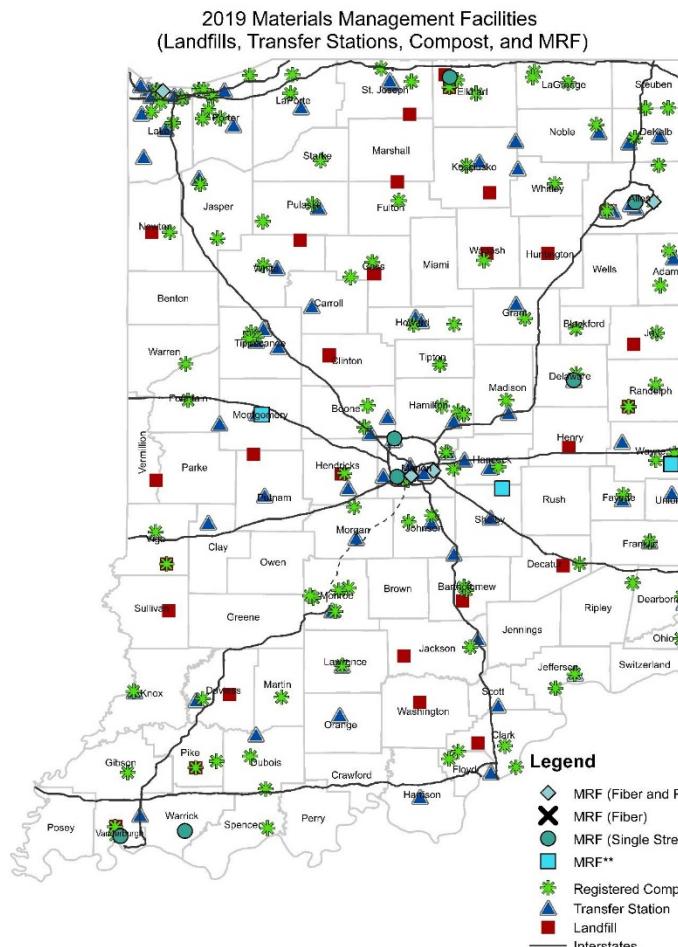
78 Transfer Stations



116 Compost Sites



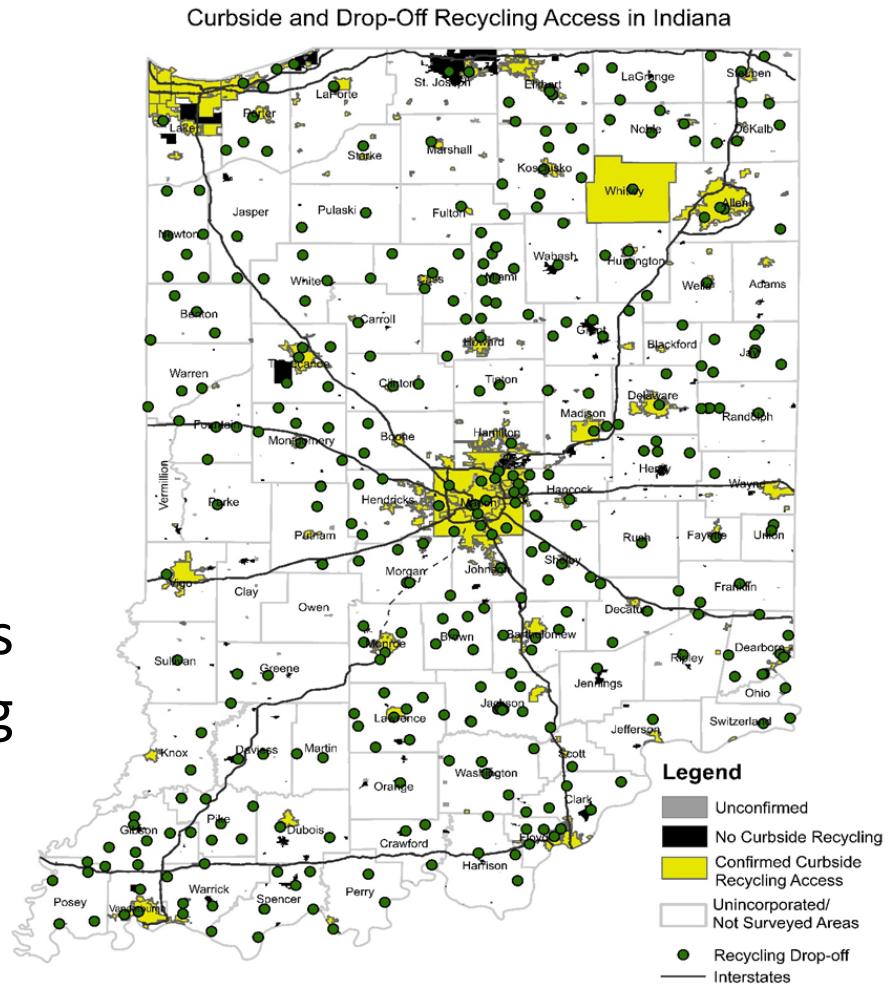
14 MRFs





Curbside and Drop-off Recycling Access Surveys

- At least 197 communities have residential curbside recycling, based on completed surveys
- 313 recycling drop-offs across the state
- 97% of the counties have access to curbside or drop-off recycling





Indiana's Recycling Economic Impact

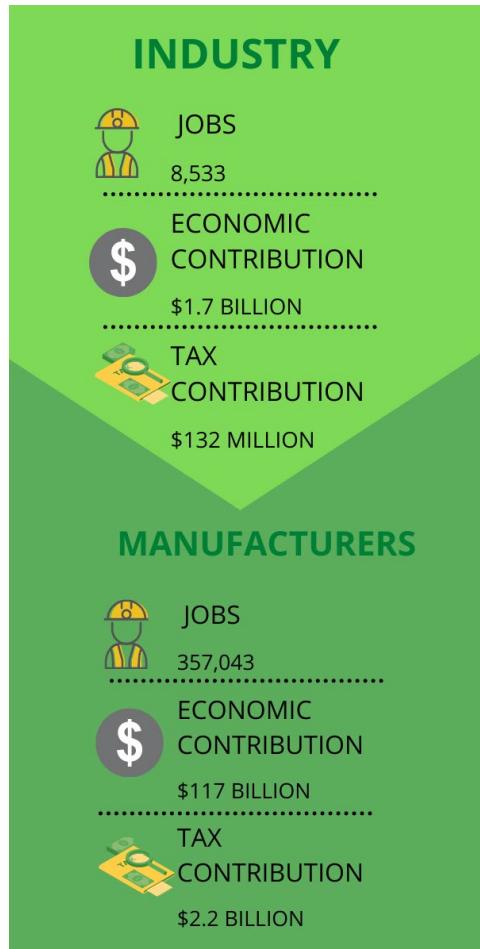
- The economic portion of the study focuses on the impact of two areas of the circular economy in Indiana:
 - The **supply side** provided by the collection and processing of recyclables performed by the recycling industry
 - The **demand side** represented by manufacturers using recycled commodities.





Indiana's Recycling Economic Impact

- Economic impact was determined using IMPLAN model inputs and analyzed by IU Public Policy Institute
 - Data used included IDEM's recycling activity report, commodity pricing averages, limited survey data, and the North American Industry Classification System (NAICS) codes



The Study assessed direct, indirect, and induced economic contributions of the recycling industry and manufacturers

- Indirect jobs are the inter-industry impacts attributed to company spending on goods and services
- Induced impacts include the impacts of household spending by the employees generated by the direct and indirect impacts



Indiana's Recycling Economic Impact

Recycling industry or supply-side employment

	Direct	Indirect & Induced	Total
Employment	4,255	4,278	8,533
Employee compensation	\$282,060,456	\$231,834,608	\$513,895,064
Value added	\$586,851,454	\$388,289,298	\$975,140,752
Output	\$1,034,863,496	\$702,829,848	\$1,737,693,344



Indiana's Recycling Economic Impact

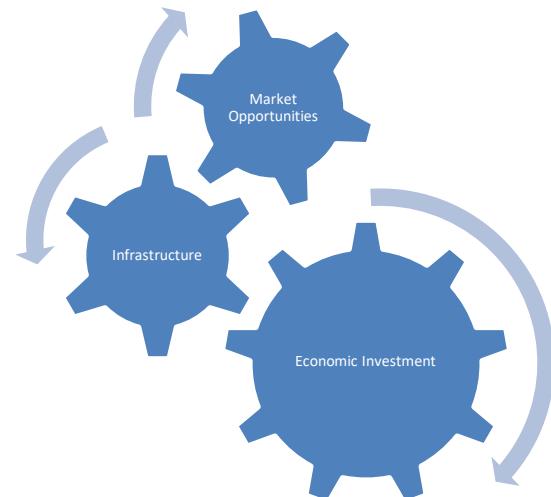
End users or demand-side employment

	Glass	Metals	Fiber	Plastics
Direct employment	4,433	96,170	10,114	32,713
Indirect employment	4685	170,056	10,678	28,194
Total employment	9,118	266,226	20,792	60,907
Compensation	\$570 million	\$17 billion	\$1.3 billion	\$3.5 billion
Total output	\$2.6 billion	\$95 billion	\$5 billion	\$14.5 billion



What's Next?

- Recommendations
 - Data collection
 - Materials management planning
 - Indianapolis and Marion County
 - State and local funding
 - Recycling collection programs
 - Recycling processing
 - Organics and food waste
 - Grant programs
 - Economic development
 - End-user recycling markets
 - Public-private partnerships
- Long-Term Roadmap





Questions?

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